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Manager Self Service (MSS) Instructions for JAWS Users

General Tips and Instructions

Please follow these instructions carefully the first time you use MSS with JAWS. It will get you through the screens successfully and give you the opportunity to learn how the JAWS keyboard shortcuts work in this environment. If you are an experienced JAWS user, you may find other ways to navigate the application by experimenting and exploring the screens in the future.

Tips:

- **Moving in and Out of Forms Mode**: As noted several times throughout the instructions, you may encounter some problems when you are either in or out of forms mode and need to switch back. If your cursor is in an edit box where you are trying to make an entry, try pressing the Enter key to get back into forms mode. Or if you are trying to use a keyboard shortcut that's not working, press the plus sign on the NUMPAD to get out of forms mode.
- **Don't go too fast**! Until you become familiar with the screens, listen a little longer than you might ordinarily to a field description in case the item you are searching for is preceded by some extra information. For example, you may hear "Drop down box, 1 of 10 items" before you hear "Time Worked," the item you are seeking.

The instructions that follow contain step-by-step actions as well as explanations of screens and content so that you can orient yourself and understand how and why you are taking certain steps.

Logging On

1. Log onto BEACON SAP portal at **https://mybeacon.nc.gov** using your NCID log-on ID and password (obtained through your agency).
    a. Since this is a form, tab until you hear "NCID star Edit" and press Enter to hear "Forms mode on, secure connection" before you begin typing in your NCID.
    b. After typing in your NCID, tab until you hear the "Password star password, edit" field and type in your password and then press Enter.
2. When you are on the BEACON home page, you will hear "Home - OSC - BEACON Employee Portal."

Approving, Rejecting, or Resubmitting Time

From the BEACON home page, follow these steps:

1. Tab until you hear “Manager Self Service this page link” and press Enter.
2. Tab until you hear “Approve Time Sheet Data this page link” and press Enter.
3. Tab until you hear “View – drop down list box - Weekly View – Simple”.
4. If you need to choose another option for employees who receive Premium Pay and/or record their hours using Charge Objects, press Enter to enter forms mode. Then press F4 to access the list of choices (Weekly or Daily Views With or Without Charge Objects) and use your up or down arrow keys to move through the list. Press Enter when you have reached the choice you need.
5. If you hear the phrase “No data exists that needs to be approved,” you have no timesheets submitted for your approval. If you do not hear that phrase, continue with the next step.
6. Tab until you hear the word “Table” or the phrase “Collective Approval**”** title for the table. This table contains all unapproved time your employees have submitted. This is where you will approve or reject the timesheets. To familiarize yourself with this table, tab through the headers. The following describes the full meaning of the headers you will hear.
   - Employee – the employee number
   - Empl./appl.name – the employee name
   - Frm – from date for beginning of work week
   - To – to date for end of work week
   - Message – warning message

     If an exclamation point graphic displays in this column, it will read: “The release times fall short of the target times, graphic” or “The release times exceed the target times, graphic.” If you hear this message, it means that the employee has recorded a total of less than or more than the expected hours for a normal work week.
   - Number – number of hours worked for the week
   - Target Time – expected hours for the week, such as 40 for a typical full-time employee
   - Approval – gives you choices to approve, reject, or resubmit (hold) the hours until you decide to approve or reject
   - Rejection Reason – no entry required in this column
7. After tabbing through the table headers ending with Rejection Reason, continue tabbing to get to the first line of employee data to review. As you tab through the row, you will hear one employee’s information starting with the employee number.

8. Tab through the employee number, employee name, from and to dates for the week submitted, and any warning message. Then you'll hear an hour total such as "40 H" for the total time entered for that week.
    - If you want to get more information on the total hours listed for any week, when you get to the hours field, you may press enter to go to the full week's listing.
    - For example, you will hear "38 H" for 38 hours total, so you may want to review the days in that week to find out what the employee is submitting for each day. You might find that the employee forgot to code 2 hours leave for a day when recording just 6 hours for working time.
    - After pressing Enter, you will be on another screen that lists the specific hours for the days in that week. You may tab through the table to review the days and hours.
    - To get back to the main Approve Time Sheet Data screen, press Tab until you hear "Previous Step link" and press Enter.
9. You are now back on the main Collective Approval Time screen. Then tab through the fields to continue through the current listing or on to others to continue reviewing time entries.
10. After listening to each listing of hours, you will get to the approval option. When you hear "Drop-down list box Approve All, one of 3 items" you have reached the field where you will approve, reject or resubmit (hold) the time submitted. If you want to approve all of the hours submitted for that week, you don't need to do anything here since Approve All is already selected. You can tab through the next field (Rejection Reason) and then on to the next employee line to go to the next employee's record.
    - If you want to reject the hours or resubmit (hold), when you are on the Approval field, press Enter to go into forms mode and the press the F4 key.
    - Use the down arrow keys until you hear the choice you want – Reject All or Resubmit All.
    - If you want to Reject All time submitted by the employee for the week, stop when you hear that option and the system will hold that code. Then tab on to the next field (Rejection Reason) and press the F4 key. Use the down arrow keys until you hear Rejected.
    - The employee would find this rejection notice the next time he or she enters ESS to record time. If the employee must re-submit the hours by a certain deadline, contact the employee about the resubmission requirement.

- If you want to Resubmit All time submitted by the employee for the week, stop when you hear that option and the system will hold that code. This allows the system to retain the hours until you decide to approve or reject. Then tab on to the next field (Rejection Reason) and then on to the next employee line to go to the next employee's record.

11. Continue with any other weeks or other employees, reviewing the hours and selecting Approval All, Reject, or Resubmit for each week submitted for approval.
12. When you reach the end of the last employee line, you will hear "Tab, out of table." Then tab until you hear "Review link" and press Enter to go to the review screen.
13. After waiting a few seconds for the new screen to load, press Insert + T to hear the title of the screen and confirm the "Approve Time Sheet Data" screen that has now loaded. The information is divided into Rejected and Approved time. Daily hours are listed for each employee on each row.
14. To review the times, follow these instructions before Saving.
    - Tab a number of times to reach the column headers listed below. A detailed explanation follows since a number of the headers are abbreviations:
        - Employee – the employee number
        - Employee Name – the employee name
        - A/A Type – code for hours worked or leave taken such as 9500
        - A/A Type Description – description of code, such as Hours Worked for 9500 code
        - Prem No – refers to Premium Pay if applicable
        - Premium Desc – Premium Description such as "Night Premium"
        - Date – date for that hour's time
        - Number – number of hours
    - Tab through the screen fields to review the data. If you rejected any working times, you will hear the "Rejected Working Times" heading for the first section. Tab thorough the fields to review the total rejected times.
    - Then tab through the "Approved Working Times" fields to review the total approved times.
15. Tab until you hear "Save link" and press Enter.
16. After pressing Enter, give the confirmation screen a few seconds to load. Then you may tab until you hear the phrase, "Your Data has been saved" to confirm that the Save action worked.
17. If you want to go back and approve additional working times, tab until you hear "Approve Additional Working Times link" and press Enter. Then follow the previous instructions to approve or reject other employees' time entries.
18. To exit this screen or go to other areas of MSS, press the U key on your keyboard. This is a Quick Key that takes you to the next unvisited link. On this screen it takes

you to the top where you can tab or continue pressing the U key until you hear “Log Off link” or any other links to go to other areas. Press Enter. If you Log Off, tab through “Are you sure you want to log off” until you hear “Yes link” and press Enter.

Monitoring Your Employees’ Important Dates and Deadlines

From the BEACON home page, follow these steps:

1. Tab until you hear “Manager Self Service” and press Enter.
2. Tab until you hear “Reminder of Dates” and press Enter.
3. Tab through the entries to hear any information saved on this screen. If none were generated, you will hear “No data available.”

   Note: Since the list of events is automatically generated by the system, you cannot add or change events.
4. When you are ready to exit this screen, tab or press the U key until you hear “Log Off link” and press Enter. Then tab until you hear, “Are you sure you want to log off” followed by “Yes link.” Press Enter.

Accessing Your Team Calendar

From the BEACON home page, follow these steps:

1. Tab until you hear “Manager Self Service” and press Enter.
2. Tab until you hear “Team Calendar” and press Enter.
3. Tab through the entries to review any information saved on this screen.
4. When you hear drop-down box listing the current month, follow the JAWS reader instructions to press Enter and use your up and down arrow keys if you want to select any other month.
5. When you are ready to exit this screen, tab or press the U key until you hear “Log Off link” and press Enter. Then tab until you hear, “Are you sure you want to log off” followed by “Yes link” and press Enter.

Finding Basic Information about Your Employees

From the BEACON home page, follow these steps:

1. Tab until you hear “Manager Self Service” and press Enter.
2. Tab until you hear “Employee Search” and press Enter.
3. Tab until you hear “Display drop-down list box – Organizational Information.” If you want to change the display to “Employee Information,” follow the JAWS reader instructions to press Enter to go into enter forms mode and use F4 to access the drop-down list. Use your arrow key to select the “Employee Information” option.

4. Tab through the entries to review any information saved on this screen on each of your employees. The columns include Name, Personnel Number, Organizational Unit, Position, Personnel Area, Personnel Subarea.

Viewing and Approving Leave Requests

From the BEACON home page, follow these steps:

1. Tab until you hear “Manager Self Service” and press Enter.
2. Tab until you hear “Approve Leave request” and press Enter.
3. If you have any pending leave requests, tab until you hear “*Name of Employee*’s Leave Request Link” and press Enter.
4. A second window will start to load, press Enter to allow the page to fully load.
5. Tab through the screen fields to hear the employee name, type, amount, and dates of leave requested as well as the employee’s available leave balances.
6. Continue to tab until you get to bottom of the screen where you will hear the Approve and Reject options. Press Enter to make your selection.
7. If you selected approve, the screen will reload. Tab again until you hear “Review Link” and press Enter.
8. Tab to review the request summary until you hear the “Approve Request link” and then press Enter.
9. A verification screen display. Tab until you hear the phrase “You have approved the leave request.”
10. To exit this window, use the close window JAWS function of holding down your Control key and typing “W.”
6. Then back on the main screen, when you are ready to exit, tab until you hear “Log Off link” and press Enter. Then tab until you hear, “Are you sure you want to log off” followed by “Yes link” and press Enter.

Accessing and Reviewing Time-Related Reports

From the BEACON home page, follow these steps:

1. Tab until you hear “Manager Self Service” and press Enter.
2. Tab until you hear one of the three report titles listed below that you would like to review and press Enter. Instructions for reading each report follow.
    a. Working Time Report
    b. Time Leveling Report
    c. Quota balances Overview
3. If you want to access and review the **Working Time Report**, follow steps A through M below. If not, skip to Step 4 below.
    a. Tab until you hear “Working Times Report.”

b. Tab until you hear “Input field for” the current time period begin date. If you want to change the date, press Enter to go to forms mode, use backspace key to delete the date entry, and then type in the begin date in a MM/DD/YYYY format. If not, continue to Step C.
c. Tab until you hear “Input field for” the current time period end date. If you want to change the date, press Enter to go to forms mode, use backspace key to delete the date entry, and then type in the end date in a MM/DD/YYYY format. If not, continue to Step D.
d. Tab through the next six fields listed below. You will only hear a reference to a check mark and no field names, so tab through all 6 check references and then use Shift-tab to go back through each one and use your space bar if you want to “uncheck” any of the report format options. If you take no action, all 6 format options will display on the report.
    - In process
    - Released for approval
    - Approved
    - Approval Rejected
    - Changed after approval
    - Canceled
e. Tab until you hear “Drop-down list box” and if you want the report to display all types of working time and leave for each employee, make no entry. If you want to specify only one type of work or leave time, press F-4 to open the list and use your up and down arrow keys to select the type of work time or leave you want to display.
f. Tab until you hear “Pers. No.” and then “Name.” Continue tabbing until you hear the Personnel Number and name of the first 5 of your employees. If you have more than 5 employees and want to listen to the list of all employees, tab until you hear “next page link” and press Enter. Then press Shift-Tab until you hear “Name” and then Tab through all of the employee names in this section of the listing.
g. As you listen to the employee names, if you want to select certain employees only to run the report, press Enter on the “Pers. No.” or “Name” field of each. If you want to include all employees, tab until you hear “Select all” and press Enter.
h. When you are ready to run the report, tab until you hear “Execute” and press Enter.
i. Give the report some time to load and then tab until you hear “Employee Time Details.”
j. Tab next to “Excel Export” link and press enter if you would like to create an Excel version of the report.

k. Continue tabbing through the report to hear the column heading and then each employee’s information in the column header order that follows in the list below:
    - Name
    - Pers. No.
    - Date (listed in YYYYMMDD format)
    - Status
    - Hours
    - A/A Type
    - Prem. No.
    - Short Text
    - Charge Object
    - Activity
    - Element
    - Sub-element

l. If it is a lengthy report, you may need to press Enter to select the “Next Row” Next Page” or “Last Row” links to move forward through the report listings.

m. To exit the report, tab or press the U key until you hear another report name, other section of MSS you need, or “Log Off” and press Enter. If you are logging off, tab until you hear, “Are you sure you want to log off” followed by “Yes link” and press Enter.

4. If you want to access and review the **Time Leveling Report**, follow steps A through L below. If not, skip to Step 5 below.

    a. Tab until you hear “Time Leveling Report.”

    b. Tab until you hear “Input field for” the current time period begin date. If you want to change the date, press Enter to go to forms mode, use backspace key to delete the date entry, and then type in the begin date in a MM/DD/YYYY format. If not, continue to Step C.

    c. Tab until you hear “Input field for” the current time period end date. If you want to change the date, press Enter to go to forms mode, use backspace key to delete the date entry, and then type in the end date in a MM/DD/YYYY format. If not, continue to Step D.

    d. Tab until you hear “First day of Week:” and then tab to the next field to hear “Drop-down list box -1-Sunday.” This means that the report will display the workweeks with a Sunday start date (typical for most employees). If you want to select another start date, press Enter and use your up and down arrow keys and press Enter to select one of the other start days.

    e. Tab until you hear “Pers. No.” and then “Name.” Continue tabbing until you hear the Personnel Number and name of the first 5 of your employees. If you have more than 5 employees and want to listen to the list of all employees, tab until you hear “next page link” and press Enter. Then press Shift-Tab until you hear “Name” and then Tab through all of the employee names in this section of the listing.

f. As you listen to the employee names, if you want to select certain employees only to run the report, press Enter on the “Pers. No.” or “Name” field of each. If you want to include all employees, tab until you hear “Select all link” and press Enter.

g. When you are ready to run the report, tab until you hear “Execute” and press Enter.

h. Give the report some time to load and then tab until you hear “Employee Leveling Details.”

i. Tab next to “Excel Export” link and press enter if you would like to create an Excel version of the report.

j. Continue tabbing through the report to hear the column heading and then each employee’s information in the column header order that follows in the list below:

    - Pers. No.
    - Name
    - From Date (listed in M/D/YYYY format)
    - To Date (listed in M/D/YYYY format)
    - Period (refers to week number)
    - Target (refers to expected number of hours)
    - Recorded (refers to actual number of hours recorded by employee)
    - Variance (refers to positive or negative balance recorded)

k. If it is a lengthy report, you may need to press Enter to select the “Next Row” Next Page” or “Last Row” links to move forward through the report listings.

l. To exit the report, tab or press the U key until you hear another report name, other section of MSS you need, or “Log Off” and press Enter. If you are logging off, tab until you hear, “Are you sure you want to log off” followed by “Yes link” and press Enter.

5. If you want to access and review the **Quota Balances Overview**, follow steps A through F below.

    a. Tab until you hear “Quota Balances Overview.”

    b. Tab until you hear “Pers. No.” and then “Name.” Continue tabbing until you hear the Personnel Number and name of the employee whose quota balances you want to review and then press Enter. If you have more than 5 employees and want to continue through the list of all employees, tab until you hear “next page link” and press Enter. Then press Shift-Tab until you hear “Name” and then Tab through all of the employee names in this section of the listing until you find the employee name you are seeking.

    c. After you press Enter, that particular employee’s quota balances display on the report but you will need to tab through the rest of the first 5 employee names and information until you hear "Employee Quota Details (Balances as of Today's Date) to start reviewing this employee's balances.

d. As you tab through the display, you will hear the following headers and then the employee's corresponding totals:
    - Time Account (refers to type of leave)
    - Deductible from
    - Deductible to
    - Entitlement
    - Remainder
e. To go to another employee, tab until you get back to the beginning of the report. You will hear "Quota Balances Overview" and then follow steps B through D again to hear the balances for another employee.
f. To exit the report, tab or press the U key until you hear another report name, other section of MSS you need, or "Log Off" and press Enter. If you are logging off, tab until you hear, "Are you sure you want to log off" followed by "Yes link" and press Enter.

Getting Help

To contact BEST Shared Services:

- In the Raleigh area, call 919-707-0707
- Statewide, call 866-622-3784
- Email BEST Shared Services at best@osc.nc.gov
- Web Site: http://www.osc.nc.gov/BEST

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